Remote Onboarding Checklist

BEFORE EMPLOYEE'S START DATE

Job Duties and Schedule

- [ ] Contact the employee with useful information that may include any of the following:
  - Information about whether part or all of the orientation will take place remotely or at a specific location
  - Confirmation of the start date, time, place, parking, maps and dress code
  - Name of his or her mentor, if applicable
  - Request to complete new-hire paperwork, Form I-9, tax forms, direct deposit form and emergency contact information
- [ ] Add regularly scheduled meetings to the employee's calendar.
- [ ] Plan the employee's first orientation, training and assignments.

Social

- [ ] Email the employee's department with relevant information about their new team member, such as his or her start date, role and a brief bio. Copy the new employee, if appropriate.
- [ ] Select and meet with the new hire's mentor, if applicable. Provide suggestions and tips.
- [ ] Set up meetings with critical people for the employee's first few weeks.

Work Environment and Technology

- [ ] Plan for the employee's remote workstation.
- [ ] Communicate technology expectations of the employee ahead of their start date.
- [ ] Order any necessary training materials.
- [ ] Order business cards if necessary.
- [ ] Order equipment and plan for necessary software.
- [ ] Arrange for access to common shared network drives.
- [ ] Add the employee to relevant email distribution lists.
- [ ] Arrange for employee phone service and/or phone plan.

Training & Development

- [ ] Arrange pertinent training required for the job.

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FIRST DAY

Job Duties and Schedule

- ☐ Introduce the employee to the virtual workspace.
- ☐ Review outline of duties and expectations for the first week.
- ☐ Review hours of work. Explain policies and procedures for overtime, use of vacation, sick time and holidays.

Social

- ☐ Be available to greet the employee on the first day, either in-person or via video chat.
- ☐ Introduce the employee to others in the workplace and his or her mentor.

Employee Intranet and Tools

- ☐ Give the employee a key or building access card.
- ☐ Give the employee a tour of employee intranet and key tools.
- ☐ Explain how to get IT support.

Technology

- ☐ Provide information on setting up voicemail and their computer.
- ☐ Ensure that the employee has a fully functioning workstation.

FIRST WEEK

Job Duties and Schedule

- ☐ Give the employee his or her initial assignment—something small and doable.
- ☐ Briefly check in with the employee each day to address any questions or concerns that may arise.
- ☐ Explain the annual performance review and goal-setting process.
- ☐ Review the process related to the probationary period, if applicable.

FIRST 3 MONTHS

Job Duties and Schedule

- ☐ Conduct regularly occurring one-on-one meetings while giving timely, useful feedback.
- ☐ Meet for an informal three-month performance check-in.
- ☐ Create written performance goals and professional development goals.

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Social

☐ Meet with the employee's mentor to review initial stages of mentorship and answer questions.

☐ Make sure that the employee is a part of ongoing conference or video calls on a regular basis.

Training and Development

☐ Ensure the employee has attended all scheduled training and is signed up for any future training sessions that may be needed.

☐ Provide information about continued learning opportunities, if applicable.

FIRST 6 MONTHS

Job Duties and Schedule

☐ Conduct a six-month performance review.

☐ Review progress on performance goals and professional development goals.

FIRST YEAR (BETWEEN 6 AND 12 MONTHS)

Job Duties and Schedule

☐ Celebrate successes and recognition of the employee's contributions.

☐ Continue providing regular informal feedback; provide formal feedback during the annual review process.

☐ Have a conversation with the employee about his or her experience to date.

☐ Discuss potential goals for the next year.

Training and Development

☐ Discuss the employee's professional development goals and identify relevant learning opportunities.

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